



**PLANNING COMMISSION  
SUPPLEMENTAL AGENDA**

May 4, 2017

7:00 p.m.

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**7) Discussion Items**

- a) Comprehensive Plan Update Status & Prioritization of Work Items

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**PLANNING COMMISSION  
REGULAR MEETING AGENDA**

May 4, 2017

7:00 p.m.

- 1) Call to Order** – Chairman Theresa Stein
- 2) Pledge of Allegiance**
- 3) Agenda Amendments** (Planning Commission and Staff)
- 4) Commissioner Disclosures**
- 5) Public Hearings**
  - a) None Scheduled
- 6) Presentations**
  - a) None Scheduled
- 7) Discussion Items**
  - a) Comprehensive Plan Update Status & Prioritization of Work Items
- 8) Action Items**
  - a) OA16-05 – Zoning Ordinance Text Amendment to Reduce Maximum Building Heights in the C-4 District  
*Note: Any Discussion Item may be added as an Action Item during the meeting by motion of the Planning Commission.*
- 9) Information Items**
  - a) Status of Priority Work Items
- 10) Citizen Comments** – All citizens who wish to speak about an item or issue that is not listed for a public hearing will be given an opportunity to speak (3 minute limit per speaker).
- 11) Council Representative's Report**
- 12) Chairman's Comments**
- 13) Planning Commissioners' Comments**
- 14) Approval of Minutes**
  - a) March 16, 2017 Regular Meeting
- 15) Adjournment**

If you require any type of reasonable accommodation as a result of physical, sensory or mental disability in order to participate in this meeting OR if you would like an expanded copy of this agenda, please contact the Department of Community Development at (540) 338-2304 at least three days in advance of the meeting. Expanded copies of the agenda may not be available the night of the meeting, please request a copy in advance.

USE OF ELECTRONIC DEVICES DURING MEETINGS For the comfort and consideration of others, all cellular phones must be turned off and cannot be used in the Council Chambers. Pagers must be set on silent or vibrate mode. This is requested because of potential interference with our recording devices and the transmittal of our hearing impaired broadcast.

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**STAFF REPORT**  
**DISCUSSION ITEM**

Item # 7a

**SUBJECT:** Comprehensive Plan Update Status & Prioritization of Work Items

**DATE OF MEETING:** May 4, 2017

**STAFF CONTACT:** Daniel Galindo, AICP – Senior Planner

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**SUMMARY:**

At recent Planning Commission meetings, members of the Commission have requested an update on the status of the Comprehensive Plan Update Project and a list of the remaining steps to the project's completion. In addition, at the April 25<sup>th</sup> Town Council meeting, the Council requested that the Planning Commission consider a possible zoning ordinance text amendment regarding the topic of outdoor storage and inform Town Council where the Commission believes that work item should rank in comparison to the Commission's other priorities. For the Planning Commission's consideration and discussion, this report addresses both topics so that the Commission can understand the level of work that Staff must undertake to address even the simplest of these priorities and the tradeoffs that result from choosing how many priorities to pursue at once. Staff is seeking the Planning Commission's guidance on how best to proceed to ensure that the Town's numerous priorities are addressed adequately and in a timely fashion. In addition, the Town Manager emailed Town Council prior to the May 1<sup>st</sup> budget work session (Attachment 1) to make them aware of the current issues with an increasing number of competing priorities and the limited staff resources available to handle them. In the email, the Town Manager recommended that Council consider allocating more staffing and/or resources to Community Development to address the current and future workload expected of Staff. The Mayor and Town Council have requested that Staff provide additional information on these priorities for Council's consideration.

**CURRENT STATUS OF THE COMPREHENSIVE PLAN UPDATE PROJECT:**

In January and February of this year, Staff presented the Planning Commission with a draft outline for the Comprehensive Plan document and draft planning framework maps

displaying the concepts, and then the actual boundaries, proposed to be included in the plan. After the Planning Commission consented to proceed with slightly modified versions of these drafts, Staff worked with the consultant team to finalize the drafts. The consultants then began expanding the outline in to working documents by pulling together information and ideas for each chapter during February and March. During this period, Staff and the consultants held regular phone calls to discuss various issues and questions as the consultants attempted to build the basic narrative of each chapter.

Since March, the consultants and Staff have been collaboratively working on additional research, mapping, and adding to or revising the various chapters of the document as our schedules have allowed, but a large number of other competing priorities have increasingly diverted Staff's time and attention away from the plan as discussed further below. At this time, the status of the initial draft of the comprehensive plan varies by the chapter. Some chapters are more complete than others. Most-to-all are currently waiting for Staff to simply have enough time available to incorporate a number of substantial ideas, additions and edits that Staff has accumulated which are unfortunately spread between numerous printed and digital documents. Once that occurs, Staff and the consultant team need to finalize the mapping and diagrams for the plan. The implementation chapter has also purposefully been left as the last chapter to be completed because it will primarily consist of prioritizing ideas already expressed elsewhere in the document. A more detailed list of the remaining steps to completion are contained later in this report.

**CAUSES FOR THE DELAYED COMPLETION OF THE COMPREHENSIVE PLAN DRAFT:**

While many of the work items regularly processed by Staff and the Planning Commission usually focus on a single topic, a comprehensive plan is a large and complex document that covers a wide range of issues. Therefore, it must be written to capture big inspirational ideas and goals as well as smaller practical details. Staff has found that it is most productive at working on the draft plan when it can focus solely on the plan in large chunks of time. Unfortunately, that has generally not been possible over the past few months due to a significant increase in the number of active legislative items being handled by Staff.

Despite working an increasing and substantial amount of overtime, Staff is no longer able to keep up with the amount of work that would be necessary to rapidly pursue the number of active legislative work items (including the Comprehensive Plan Update) which are being requested. While the vast majority of Staff's work that is seen by the Planning Commission is related to these work items, that work is in addition to Staff's common duties and a number of recent process improvements that have been made to address the desires and

expectations of Town Council and the Planning Commission. As a result, the completion of the draft comprehensive plan has been delayed as have all active work items to some degree.

### ***Active Work Items***

Between Town-initiated legislative work items and the increasing number of legislative applications that have been received from external applicants, there are now too many active priorities dividing Staff's time and attention which has led to delays on all projects. Staff has created a table (Attachment 2) which displays all legislative items that were already in process in January 2016, when work on the comprehensive plan began in earnest, as well as all legislative items that have been started or listed as a priority in the time since. As displayed in the table, there have been 27 of these items during this period, but Staff has labeled two of the items as "pending" because they have not yet become active projects involving work by Staff despite being listed as priorities. Of the 25 remaining projects, 10 have been completed while 15 are currently active. While Staff does not necessarily work on all of these items continuously, it often works on a majority of them within a short period of time. For example, as noted in the Status of Priority Work Items staff report for the May 4<sup>th</sup> Planning Commission meeting, Staff worked on 11 of the currently active items in some fashion over the past two week period.

The tally of active items per month at the bottom of the table also shows that the number of active items has greatly increased over the past 17 months. Between January 2016 and July 2016, the number of active items consistently remained in the single digits, but the number of active items increased to double digits in August 2016 and has remained there since. In effect, and as summarized in the table below, the number of active items is now roughly double what it was when the Comprehensive Plan Update Project began.

<b>Time Period</b>	<b>Minimum Active Items</b>	<b>Maximum Active Items</b>	<b>Average Active Items</b>
January 2016 – July 2016	5	8	7.1
August 2016 – May 2017	10	17	13.7

In addition, Staff has recently received two requests for pre-submission conferences regarding possible legislative applications from external applicants. This usually means that the application(s) discussed will be submitted within the next one to three months. While the Town can not control when and how many external applications are submitted, it does have control over its internal expectations for when and how Town-initiated items are

handled. Therefore, it should be noted that eight of the current items are external applications while seven are Town-initiated (internal) items. The two pending priority items would also be Town-initiated items.

### ***Common Duties***

Regardless of the amount of legislative items being processed by Staff at any given time, Staff also has a significant amount of common day-to-day work that must be completed. These duties have been briefly summarized in the following table.

<b>Customer</b>	<b>Duties</b>
Citizens & Applicants <i>(general)</i>	<ul style="list-style-type: none"> <li>• Phone calls</li> <li>• Emails</li> <li>• Conversations and permit processing at the front counter</li> <li>• Meetings</li> </ul>
Town Officials & Staff <i>(general)</i>	<ul style="list-style-type: none"> <li>• Phone calls</li> <li>• Emails</li> <li>• Meetings</li> <li>• Research</li> </ul>
Board of Architectural Review <i>(per meeting)</i>	<ul style="list-style-type: none"> <li>• Review design applications</li> <li>• Create staff reports</li> <li>• Review minutes</li> <li>• Compile and print agenda packet</li> <li>• Distribute printed packets</li> <li>• Post digital packet to web</li> <li>• Email packet</li> <li>• Attend meeting</li> </ul>
Planning Commission <i>(per meeting)</i>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Create staff reports</li> <li>• Review minutes</li> <li>• Compile and print agenda packet</li> <li>• Distribute printed packets</li> <li>• Post digital packet to web</li> <li>• Email packet</li> <li>• Attend meeting</li> </ul>
Town Council Meeting <i>(per meeting)</i>	<ul style="list-style-type: none"> <li>• Create staff reports</li> <li>• Attend meeting</li> </ul>



Additionally, a significant amount of work must be completed for legislative and development applications while they are under review, and additional work is required for the public hearings involved with legislative applications. These duties have been briefly summarized in the following table.

Process	Duties
Application Review <i>(per submission; typically 3-5 total submissions)</i>	<ul style="list-style-type: none"> <li>• Certify initial application submission as complete</li> <li>• Distribute submission to referral partners for review</li> <li>• Review submission</li> <li>• Create review comments</li> <li>• Distribute all review comments to applicant</li> </ul>
Public Hearings <i>(for legislative applications)</i>	<ul style="list-style-type: none"> <li>• Determine application is ready for public hearing</li> <li>• Create ad for Planning Commission (PC) hearing and revise per legal review as necessary</li> <li>• Review ad proof from newspaper</li> <li>• Prepare public notice templates for PC hearing for use by the applicant to ensure public notice requirements are met</li> <li>• Send/post required public notice (only for Town-initiated items)</li> <li>• Create staff report for pre-hearing information item for PC (seeking input from PC on issues to consider and cover in public hearing staff report)</li> <li>• Verify adequate public notice has been provided</li> <li>• Create staff report for PC hearing (commonly including motions in case a vote is desired)</li> <li>• Create post-hearing staff report for PC action (may include any changes proposed in response to public or PC comments)</li> <li>• Update previous ad for Town Council (TC) hearing and revise per legal review as necessary</li> <li>• Review ad proof from newspaper</li> <li>• Update previous public notice templates for TC hearing for use by the applicant to ensure public notice requirements are met</li> <li>• Send/post required public notice (only for Town-initiated items)</li> </ul>

Process	Duties
	<ul style="list-style-type: none"> <li>• Verify adequate public notice has been provided</li> <li>• Create resolution for TC action and revise per legal review as necessary</li> <li>• Create staff report for TC hearing (commonly including motions in case a vote is desired)</li> <li>• Create post-hearing staff report for TC action (may include any changes proposed in response to public or TC comments)</li> </ul>

While not part of the Town's typical process, Resolution 16-10-02 added an additional step for the four zoning ordinance text amendments which it formally initiated. This resolution required the Planning Commission to present its recommendations on these amendments to Town Council prior to holding a public hearing which has required Staff to create an additional staff report.

### ***Recent Process Improvements***

Staff has also made a number of recent improvements to our processes to address the desires and expectations of Town Council, the Planning Commission, and the public. Many of these improvements have been the result of desires for additional transparency, and while useful for that purpose, each of these improvements has resulted in additional work for Staff. The following table summarizes these recent improvements.

Topic	Improvement
Pre-Submission Conferences	At the request of Town Council, Staff created a new policy regarding meetings with potential applicants prior to the submission of an application. As a result, Staff now notifies Council when such meetings are scheduled so that any interested member of Council may attend. In addition, Staff also writes a summary of the meeting which is then emailed to all participants and the entire Town Council.
Notice of Application Acceptance	Although the Town has always complied with the minimum public notice requirements for public hearings, members of Town Council noted a desire for Staff to better inform the public and Town Council about applications earlier in the process. Therefore, once Staff has certified a new application as complete, Staff now places a notification of the application's

Topic	Improvement
	acceptance for review on to the next Town Council meeting agenda.
Application Review	It has been the Town's policy for many years to post the relevant application files for items going to public hearing on to the Town's website prior to the hearing. However, because of Town Council's desire to better inform the public and Town Council about applications earlier in the process, Staff now places all application files on to the Town website at <a href="http://www.purcellvilleva.gov/activeapps">www.purcellvilleva.gov/activeapps</a> once Staff has certified a new application as complete. In addition, Staff updates the website with all review comments and additional application materials for subsequent submissions throughout the review process. Once items are ready for public hearing, Staff also places all staff reports regarding the item on to the Town's website throughout the entirety of the public hearing process. Finally, after a final action has been taken by Town Council, Staff places the ordinance or resolution on to the website as well.
Status Update on Priority Work Items	Last year, the Planning Commission requested that Staff provide regular updates on the status of the Commission's priority work items and other ongoing projects. In response, Staff now creates a staff report for each Planning Commission meeting summarizing any recent updates on these items. See item 9a on the May 4 <sup>th</sup> agenda for an example.

***Recent Examples of Staff Time Necessary to Produce Work Products***

Staff does not typically comment on the amount of time and effort that is necessary to produce its work products, so the Planning Commission may not have an accurate understanding of the level of effort involved. In order to inform the Planning Commission about how much time goes in to the work products produced for Planning Commission meetings or as a part of Staff's other duties, Staff has provided estimates below. Since Staff does not usually track the specific amount of time spent on a project, Staff has focused on examples of recent or common work products for which it can provide generally accurate estimations. All work listed below was conducted and estimated by the Senior Planner unless otherwise noted.

OA16-01 Stream and Creek Buffer Zoning Ordinance Text Amendment – 55-60 hours

- Conducting research, production of staff reports & production of draft regulations – 40 hours +/- (*Town Attorney*)
- Review and discussion of draft regulations – 3-4 hours
- Initial GIS mapping – 6-8 hours
- Revised GIS mapping – 6-8 hours

OA16-05 Reducing Maximum Building Height in C-4 District Zoning Ordinance Text Amendment – 22-29 hours

- Review proposed amendment text – 1 hour
- Create ad for Planning Commission public hearing and revise after legal review – 2-3 hours
- Create and mail letters to all C-4 property owners about Planning Commission public hearing – 3-4 hours (*Senior Planner & Planning Technician*)
- GIS mapping – 3-4 hours
- Research building heights for C-4 properties – 3-4 hours
- Create staff report for Planning Commission public hearing – 6-8 hours
- Create and mail letters to property owners of buildings which may become nonconforming – 2-3 hours
- Update staff report for Planning Commission action – 2 hours

OA16-06 Civil Penalties Zoning Ordinance Text Amendment – 36-45 hours

- Conducting research, production of staff reports & production of draft regulations – 20-25 hours (*Director of Community Development*)
- Review proposed amendment text – 2 hours
- Research Code of Virginia, Albemarle County civil penalty regulations, etc., and create redline of proposed modifications, comments, and questions – 6-8 hours
- Combine redlines of proposed text – 4 hours (*Planning Associate*)
- Review combined redline and revise to avoid overlapping changes/comments – 4-6 hours

Other Efforts

- Creation of this staff report, supporting materials and corresponding research – 20-22 hours
- Completion of all duties involved with a Board of Architectural Review Meeting as listed in the earlier table – 12-16 hours (commonly)
  - Note: This can vary widely. 24-28 hours were spent on the March meeting because seven applications were submitted which is the most submitted for

one meeting for at least the last five years. In contrast, it appears that only one item will be on the May agenda, so it is possible that all duties can be completed in as little as 4 hours.

- Pre-Submission Conferences: notify Council & write up summary – 1-2 hours per conference
- Post application files on website – Varies widely: 5 minutes to post a single staff report; Up to 1 hour if all files for a large submission are posted at once
- Create materials for Notice of Application Acceptance to Town Council – 30 minutes to 2 hours per application
- Create Status of Priority Work Items staff report for Planning Commission – 30 minutes to 2 hours per meeting
- Pull emails per request of TC or PC member – 30 minutes

### **ISSUES and RECOMMENDATIONS:**

As of May 4<sup>th</sup>, the Planning Commission has a list of eight active priorities, and Town Council recently requested that the Planning Commission consider and prioritize a zoning ordinance text amendment regarding the topic of outdoor storage. For many months, Staff has stated to Town Council and the Planning Commission, both in private conversations and during public meetings, that Staff did not and does not have the capacity to take on additional work. As additional items have continued to be submitted by external applicants or initiated by the Town during this time, Staff has tried to do as much as it can to continue making progress on as many of these priorities as possible. However, despite working an increasing and substantial amount of overtime, there are now too many active priorities dividing Staff's time and attention. This has led to delays on all projects, including the Commission's top priority: the completion of the comprehensive plan update.

### ***Remaining Steps to Complete the Comprehensive Plan Update Project***

In order to complete the comprehensive plan, the following tasks need to occur:

- Complete the initial draft of the comprehensive plan document
  - Complete the incorporation of Staff's accumulated ideas, additions and edits into the primary working documents
  - Determine the most appropriate fiscal element to include in plan; TischlerBise creates/implements
  - Staff and consultant discuss any remaining issues with the plan narrative; consult with Planning Commission, if needed
  - Finalize maps and diagrams
  - Finalize text – including Implementation chapter

- Final verification that document incorporates all elements required by Virginia Code and all important decisions/points of information made by Planning Commission and community; final edits, if needed
- Distribute initial draft to Planning Commission for review and preliminary certification that draft does not contain any issues of great concern which would delay further distribution
- Consultants merge certified text and visuals in to formatted draft
- Distribution and review of certified and formatted draft
  - VDOT and Town's committees, commissions, and boards conduct detailed review of pertinent content
  - Planning Commission conducts detailed review of document
  - Posted to project website for detailed review by public
  - Workshop conducted for detailed review by public
- Planning Commission considers all comments resulting from review period and directs Staff to edit draft as appropriate
- Staff and consultants edit and finalize draft for Planning Commission public hearing
- Planning Commission holds public hearing on draft
- Planning Commission considers all comments from public hearing (*and directs Staff to edit draft, if necessary*)
- *Staff and consultants edit and finalize draft for Town Council public hearing, if necessary*
- Town Council holds public hearing on draft
- Town Council considers all comments from public hearing (*and directs Staff to edit draft, if necessary*)
- *Staff and consultants edit and finalize draft for Town Council adoption, if necessary*
- Town Council adopts new comprehensive plan

### ***Prioritization of Work Items***

In order to address the issues noted in this report, Staff recommends one short-term solution and one long-term solution.

#### **Short-term Solution**

If the completion of the comprehensive plan update is truly the Commission's top priority, then work on other items needs to be halted (or at least greatly diminished) for a short period, such as one month, to allow completion of the initial draft of the plan. Halting work on other items will allow Staff the time that is necessary to focus on completing the initial draft of the comprehensive plan which is a complex project.

Staff continues to believe that the most efficient course of action will be to allow Staff and the consultant team to complete the initial draft. Allowing Staff to create the initial draft has been the plan since the Comprehensive Plan Update Project was first conceptualized in the Project Management Plan (Attachment 3). As noted on page 15 of the Project Management Plan, adopted by the Planning Commission on May 7, 2015, the “owners” of the *Draft Maps and Diagrams* and *Draft Plan for Transmittal to VDOT* milestones were established as Staff and the consultant team. While Staff is under no illusion that an initial draft created through this method will be perfect, the goal has always been to provide a cohesive draft that can be easily reviewed and edited by the Planning Commission and the Town’s other committees, commissions and boards (see the *Comprehensive Plan Draft* line on page 19 of the Project Management Plan which notes these bodies as the reviewers). If the Commission disagrees with Staff’s recommendation and desires to take over the drafting of the comprehensive plan at this time, then it should provide clear direction to Staff to that effect.

#### Long-term Solution

As a long-term solution to these issues, Staff recommends that responsibility for the prioritization of work items be handled by Town Council instead of the Planning Commission. Despite good intentions, Staff does not believe that the current process of having the Planning Commission prioritize work items has produced the results desired by the Commission or Staff. Less than a year ago, Chairman Stein noted the Commission’s list of priorities within the annual report provided to Town Council at its Strategic Planning Session in September 2016. At that time, Council appeared to generally agree with the list, yet four additional work items have been formally initiated and a fifth item has been sent to the Commission for consideration in the eight months since. Staff has prepared a table (Attachment 4) showing the results of the Planning Commission’s previous rankings of its priority items since November 2015. (A blank column is also provided on the table to allow the Commission to rank the nine potential priorities currently under consideration so that this information can be reported back to Council as requested.)

Ultimately, it is Town Council that sets the budgets for staffing, overtime, and consultants, so it is Council that is best equipped to prioritize work items after weighing the often competing desires to quickly complete numerous projects and the fiscal realities faced by the Town in any given year. Specifically, Staff recommends the development of a work plan for legislative items that would be adopted by Town Council annually. Staff proposes that the work plan be adopted in the spring, as that would establish Council’s expectations prior to its budget discussions, and the work plan would then be reviewed after approximately six months as part of Council’s annual Strategic Planning Session. (Obviously, numerous alternative schedules are possible.) The basic process to develop the work plan would start with Town

Council, the Planning Commission and Staff developing lists of all possible legislative items to be considered. Staff would then evaluate a combined list to provide a proposed work plan which ranks the items and provides context for each item on issues such as: value to citizens, ease of completion, legal concerns, issues of staff administration, potential resulting time savings, length of project, and the like. Town Council, with as much input from the Planning Commission as desired, would then adopt a work plan for the year after considering Staff's recommendations and evaluations.

Unless the Planning Commission expresses a strong objection, Staff will bring this idea to Town Council as part of the recently requested information regarding priority work items.

*Possible Alternative/Supplement*

At recent Town Council meetings, Commissioner Grim has expressed a desire for the Planning Commission to organize in to project teams that each focus on a particular priority. These teams could be implemented in either the short or long-term if desired by the Commission. In theory, the teams would allow progress to be made on designated priority items while requiring less direct involvement by Staff. However, as the information provided earlier in this report hopefully makes clear, it is impossible to completely remove Staff from working on legislative items. Even on the OA16-05 amendment where Staff was not heavily involved in the initial research and creation of the proposed text of the amendment, Staff has still spent somewhere between 22-29 hours on tasks such as public notices, mapping, research and creating staff reports. Additional time will also need to be spent when the amendment is sent to Town Council. Therefore, while Staff welcomes the potential for additional help, the Planning Commission and Staff would need to set clear expectations for these teams, and Staff's interaction with them, to ensure that the intended results are achieved. Should the Commission like to discuss this idea further, Staff has developed the following list of issues for the Commission to consider:

- How many Commissioners are interested in implementing the project teams?
- How much additional time are Commissioners willing to devote to a project team, on either a consistent or limited duration basis, in addition to regular meetings and their preparation for those meetings?
- How many priority items are desired to be handled at any one time, and which items would those be?
- If the Planning Commission proceeds with the implementation of project teams, the Commission and Staff need to clarify expectations for the following issues:
  - What output is expected from a project team? Simple policy ideas? A white paper? Proposed ordinance text?



- What, if any, deadlines will the project team be held to? For example, if a project teams wants to provide materials to the Commission for discussion, should they be required to submit materials in time to be included in the agenda packet, or can they simply distribute the materials at a meeting?
- What are the expectations for Staff's direct involvement with any particular project team?
- When a project team turns over a work product to Staff, what are the expectations for how Staff should prioritize additional work on that product in comparison to items that Staff is already processing?

**ATTACHMENTS:**

1. Town Manager's Email to Town Council Requesting Discussion on Community Development Projects and Staffing
2. Table of Legislative Items Prioritized, Started, or Already in Process from January 2016 to Present
3. Project Management Plan for Town of Purcellville 2015-2017 Comprehensive Plan Review
4. Table of Priorities Established for Work Items Since November 2015

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## **Galindo, Daniel**

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**From:** Lohr, Rob  
**Sent:** Monday, May 01, 2017 4:52 PM  
**To:** Town Council  
**Cc:** Krens, Liz; Hicks, Paula; Angus, Thomas; Sullivan, Patrick; Galindo, Daniel  
**Subject:** Request for discussion on Community Development Projects and staffing

Dear Mayor and TC,

Since our last budget meeting and after the request to consider some additional Planning and Zoning Projects last week in Tuesday night's meeting, I found myself reflecting on how important the current projects are to the TC and community. I also realized that since we began the major comp plan upgrades, we have added many more projects and until I ask for a summary of all projects, I didn't fully understand or appreciate the current workload. I also realized how important all of these projects are to TC and decided for the first time in my career, I will ask TC to consider looking at an enhancement after I have delivered the budget. With this said, I would ask that TC talk with CD staff, PC and BAR to see if we can allocate more staffing or resources to Planning to address the current and future workload using the following options:

- 1) Add an additional F/T planner that can help for the next 5 years address the current workload
- 2) Bring on a retired or P/T planner with experience that can help us
- 3) Budget additional consulting funds to bring in firms or planners to help make sure we have the staffing to meet the TC and community's expected timeline

I'm fearful that we cannot keep up the expected workload and that we will miss key timelines or expectations. I also fearful that the current workload could be putting substantial pressure on our staff and that they cannot keep up this pace. Thank you for a consideration of this issue and I know that staff will welcome a chance to talk further. Rob

Robert W. Lohr, Jr.  
Town Manager

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[www.purcellvilleva.gov](http://www.purcellvilleva.gov)

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LEGISLATIVE ITEMS PRIORITIZED, STARTED, OR ALREADY IN PROCESS FROM JANUARY 2016 TO PRESENT																								
#	Item	Name/Topic	Item Type	2015				2016												2017				
				Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
1	OA15-03	Increasing Max Occupancy of Residential Child Care	External Applicant						C															
2	CPA15-02	781 South 20th Street (Mary's House of Hope)	Town-Initiated								C													
3	OA15-04	Transitional Housing	Town-Initiated								C													
4	RZ15-01	781 South 20th Street (Mary's House of Hope)	Town-Initiated								C													
5	SUP15-02	Catoctin Corner Drive Through	External Applicant														W							
6	OA16-02	Real Parties in Interest	Town-Initiated															C						
7	SUP16-03	Mary's House of Hope	Town-Initiated																C					
8	SUP16-04	Makersmiths	Town-Initiated/External Applicant																C					
9	OA16-03	Floodplain Regulations Update	Town-Initiated																	C				
10	RZ16-01	Floodplain Overlay District Remapping	Town-Initiated																	C				
11	CPA15-01	O'Toole Properties	External Applicant																					A
12	RZ15-02	O'Toole Properties	External Applicant																					A
13	--	COMPREHENSIVE PLAN UPDATE	Town-Initiated																					A
14	SUP16-01	7-Eleven Fueling Station Expansion	External Applicant																					A
15	CPA16-01	Village Case	External Applicant																					A
16	PCA16-01	Village Case	External Applicant																					A
17	SUP16-02	Virginia Regional Transit Commuter Parking Lot	External Applicant																					A
18	OA16-01	Stream and Creek Buffer/State Waters Protection	Town-Initiated																					A
19	OA16-04	Tree Preservation	Town-Initiated																					A
20	OA16-05	Reduce Maximum Heights in C-4	Town-Initiated																					A
21	OA16-06	Civil Penalties	Town-Initiated																					A
22	OA17-01	Definition of Duplex Dwelling	Town-Initiated																					A
23	SUP17-01	Assisted Living Facility (O'Toole)	External Applicant																					A
24	SUP17-02	Blue Ridge Veterinary Kennel	External Applicant																					A
25	OAxx-xx	Outdoor Storage	Town-Initiated																					A
26	OAxx-xx	Sign Regulations	Town-Initiated																					P
27	OAxx-xx	Accessory Dwelling Standards	Town-Initiated																					P
Active Items per Month (not incl. Pending Items):								8	8	7	8	5	7	7	10	11	17	16	15	13	12	13	15	15

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# **Town of Purcellville 2015-2017 Comprehensive Plan Review**

## **Project Management Plan**

**Submitters:**

Purcellville Planning Commission  
and Town Staff

**Date:**

June 4, 2015

## REVISION HISTORY

Version Number	Date	Originator(s)	Reason for Change
Draft 1	2/17/15	Paist	Initial Draft
Draft 1.1	3/30/15	Galindo	Updates to Sections 1-4
Draft 1.2	4/5/15	Paist	Updates to Sections 5, 7 and 16
Draft 1.3	4/8/15	Paist	Updates to Sections 5, 7, 14, 18 and 19
Draft 1.4	4/9/15	Galindo	Updates to Sections 6, 9, 11, 15, 17, 18 and 20
Draft 1.5	4/10/15 AM	Galindo	Updates to Sections 4-7, 9-11, and 14-20
Draft 2	4/10/15 PM	Galindo	Minor Revisions for Initial Review
Draft 2.1	4/17/15	Galindo	Update to Section 21 and Minor Revisions for Release to Planning Commission
Draft 2.2	4/20/15	Galindo	Updates to Sections 10 and 20 and Minor Revisions for Release to Town Council
<b>Adopted May 7, 2015</b>			
Draft 3	6/4/2015	Galindo	Minor Revisions for Release with Request for Proposals



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## 1. INTRODUCTION

The Project Management Plan (PMP) presents a clear and consistent definition of the scope, objectives, success criteria, communication methods, schedule, deliverables, and available resources for the review and revision of the *Purcellville, Virginia 2025 Comprehensive Plan* (2025 Plan). The PMP is a document created by the Town of Purcellville's Planning Commission Chair, Vice-Chair and staff. The document will be further reviewed, discussed, and updated, in a planning session, by the Planning Commission and a consultant before a final plan is produced.

According to Ken Black's *Causes of Project Failure*<sup>1</sup> for the Project Management Institute organization, planning for a project is:

The most important key to a project's success... While it is unlikely that project planners have knowledge of all activities and resources needed to effect successful project operations, it is imperative that they understand as much about the project goals and objectives as possible before project launch. Such planning items as project definition and scope are critical. In the survey of engineers, the No. 1 rated reason for project failure was "the project was not adequately defined at the beginning." The third most highly rated reason was "a lack of clearly defined project goals and objectives." The fifth most highly rated reason was "project planning was done with insufficient data." Another reason that was rated as important was "poor work definition." Each of these contains some aspect of project planning as a concern.

Consequently, the Purcellville Planning Commission (PC) will devote a significant amount of time to planning how to conduct the tasks necessary to, among other items, involve a cross-section of the most residents and businesses possible with innovative communication methods, define needs to be addressed, analyze feedback and technical studies, produce quality drafts of documents throughout the process, and present citizens and Town Council with an attractive and well organized final plan that is worthy of the Town of Purcellville. Normally, a well-run project utilizes 10% - 15% of its time in the planning phase.

The PMP is a living document which will be updated throughout the process of reviewing and updating the comprehensive plan and then retained for historical purposes.

## 2. AUTHORITY

The Code of Virginia grants the Planning Commission the authority and responsibility to conduct how the comprehensive plan is to be prepared and recommended while granting the Town Council with the sole authority to adopt the plan. As stated in § 15.2-2223, Section A:

"The local planning commission shall prepare and recommend a comprehensive plan for the physical development of the territory within its jurisdiction and every governing body shall adopt a comprehensive plan for the territory under its jurisdiction."

Once a comprehensive plan has been adopted, the Code of Virginia § 15.2-2230 also requires the Planning Commission to review the plan “at least once every five years...to determine whether it is advisable to amend the plan.”

The next review time frame for the Town of Purcellville is 2016, and the Town of Purcellville's Town Council recently adopted Resolution 15-01-02 on January 27, 2015 to initiate a complete review of the town's comprehensive plan and provide initial guidance on topics of particular interest to Council.

The resolution states that Council desires the review to include, but not be limited to,

1. an update of the town's history and census information;
2. an update of the town's plan for the physical development of the territory within its jurisdiction, including lands that have been incorporated into the Town's jurisdictional limits since 2006;
3. a plan for the physical development of territory located within the County's Joint Land Management Area for Purcellville;
4. amendments necessitated by the termination of the Town of Purcellville/County of Loudoun Annexation Agreement; and
5. a transportation plan that identifies the transportation infrastructure needed to support the planned development of the territory covered by the plan.

The resolution further directs the Planning Commission to make a recommendation on the revised comprehensive plan document by October 2016 while stating that Council desires to consider and adopt the revised Plan by March 2017.

The resolution is identified as Appendix A – Town Council Resolution to Initiate Review of the Town's Comprehensive Plan.

### 3. STATUTORY REQUIREMENTS

The Code of Virginia § 15.2-2223 through § 15.2-2232 states the statutory requirements concerning comprehensive plan preparation and recommendation by the Planning Commission.

#### 3.1 Preparation

As noted in Section 2 (above), the Code of Virginia grants the Planning Commission the authority to prepare the comprehensive plan, and § 15.2-2223 states the following regarding its preparation and purpose:

In the preparation of a comprehensive plan, the commission shall make careful and comprehensive surveys and studies of the existing conditions and trends of growth, and of the probable future requirements of its territory and inhabitants. The comprehensive plan shall be made with the purpose of guiding and accomplishing a coordinated, adjusted and harmonious development of the territory which will, in accordance with present and probable future needs and resources, best promote the health, safety, morals, order, convenience, prosperity and general welfare of the inhabitants, including the elderly and persons with disabilities.

### 3.2 Content

In Virginia, the Code requires certain comprehensive plan elements, and it lists many other optional elements, shown in **Table 3.1**. It is also important to note that the scope of a comprehensive plan is essentially boundless as the Code does not limit the plan's content to the topics listed.

**Table 3.1**

Required	Optional
<ul style="list-style-type: none"> <li>• A transportation plan that designates a system of infrastructure needs and recommendations that include designating new and expanded transportation facilities and that support planned development of the locality.</li> <li>• Long-range recommendations for general development, which may include optional elements.</li> <li>• Designating areas and implementation measures for constructing, rehabilitating, and maintaining affordable housing, sufficient to meet current and future needs of residents of all income levels.</li> <li>• Designating impact fee service areas, if the locality adopts an ordinance to impose a road impact fee.</li> <li>• Principles of traditional neighborhood design, if the comprehensive plan designates urban development areas.</li> </ul>	<ul style="list-style-type: none"> <li>• Designating areas for various types of public and private development and uses.</li> <li>• Designating a system of community service facilities such as parks, athletic fields, forests, schools, playgrounds, public buildings and institutions, hospitals, nursing homes, assisted living facilities, community centers, waterworks, sewage disposal areas, and waste disposal areas.</li> <li>• Establishing a capital improvements program, land use regulations, and maps of districts.</li> <li>• Designating historical areas and areas for urban renewal.</li> <li>• Designating areas for implementing reasonable groundwater protection measures.</li> <li>• Designating the location of existing and proposed recycling centers.</li> <li>• Identifying the location of military bases, military installations, and military airports and their adjacent safety areas.</li> <li>• Designating corridors or routes for electric transmission lines of 150 kilovolts or more, in consultation with the electric utility.</li> <li>• Designating one or more urban development areas.</li> </ul>

Adapted from *The Albemarle County Land Use Law Handbook*<sup>2</sup>

For accuracy and context of Virginia's statutes concerning the comprehensive plan, refer to Appendix B – Code of Virginia § 15.2-2223 through § 15.2-2232.

## 4. BACKGROUND

As noted in Section 2 (above), the Code of Virginia grants the Planning Commission the authority to review the comprehensive plan. Below are summaries of the Town of Purcellville's comprehensive plan reviews conducted over the past ten years.

### 4.1 2004-2006 Comprehensive Plan Review

As detailed on pages 4 through 8 of the 2025 Plan, the Plan's review and development arguably started three and a half years before its ultimate adoption. Beginning in May 2003, the Town held numerous charrettes, workshops, and meetings to provide opportunities for public involvement in the planning process. More formally, two workshops were held in September 2004 specifically for updating the Plan, and a private consultant was hired in the spring of 2005 to assist in the Plan's completion. With the consultant hired, a 10-month schedule from March to December 2005 was initially proposed for the creation and adoption of the document; however, the 2025 Plan was not ultimately adopted until December 19, 2006—a full year beyond the initial timeline.

Prior to the adoption of the 2025 Plan, the Town's Parks and Recreation Advisory Board (PRAB) worked throughout 2004 and 2005 to create the *Comprehensive Parks, Recreation, & Open Space Master Plan*, but it was not until January 8, 2008 that the Town adopted this document as an element of the 2025 Plan. The Town also worked from 2007 to 2009 on what would ultimately become the *Purcellville Townwide Transportation Plan* which was adopted as an element of the 2025 Plan on October 13, 2009.

### 4.2 2010-2011 Comprehensive Plan Review

In September 2010, town staff presented a draft schedule for reviewing the 2025 Plan to the Planning Commission, and the "kickoff" meeting for the review was held at the Commission's October 21<sup>st</sup> work session. However, due to staff turnover, the Commission did not start regularly reviewing the 2025 Plan during work sessions until February 2011. With new staff in place, the review undertaken was more limited than originally proposed and focused on assessing the plan's Implementation Progress Matrix. Over the course of the following 8 months, the Commission reviewed the 2025 Plan as part of 12 work sessions held after its regular meetings and measured the progress of implementation. Ultimately, the Planning Commission's recommended amendments resulting from this review were never adopted by Town Council.

## 5. UPDATE PURPOSE AND OBJECTIVES

According to Code of Virginia, the Town of Purcellville's Planning Commission must, at minimum, conduct a review to determine if comprehensive plan amendments are advised. Per the Town Council's resolution and due to rapid residential and business growth, changes in the residential, commercial, and industrial sectors, and the influx of

new town citizens with differing visions for the town, the Planning Commission will conduct a full review and update of the existing comprehensive plan.

## 5.1 Purpose

“The greatest human achievements - from ancient pyramids to modern skyscrapers - have all resulted from an ability to envision the future and muster the resources needed to achieve it.”

– American Planning Association

The Town of Purcellville reviews and updates its comprehensive plan not only to satisfy the requirements of the Code of Virginia but to create an achievable vision of the town’s future for the next generation. The comprehensive plan is the town’s blueprint for future development and serves as the foundation for all decision-making in matters involving land use planning, zoning, and growth management.

The Town of Purcellville’s review, update, and use of its comprehensive plan strives to:

- Improve the quality of the physical environment of the community in response to social, economic, and physical realities and forecasts;
- Provide for the well-being of the entire community, rather than advance the special interests of individuals or groups within the community;
- Promote community goals, objectives, and policies;
- Insert long-range considerations of goals in decisions about short-range actions;
- Act as a guide in the formation of additional plans;
- Coordinate the political and technical aspects of community development in order to eliminate conflict; and
- Enhance citizen participation in community development and provide citizens with a sense of security and civic pride.

## 5.2 Objectives

Four broad objectives in the comprehensive plan update are outlined in the PMP. Those objectives are to:

- Create community enthusiasm for updating the comprehensive plan;
- Gather input from a diverse range of residents, workers, and business owners;
- Analyze and discuss objective data and community input; and
- Capture the community’s vision for Purcellville in a world-class professionally-produced comprehensive plan.

### Community Enthusiasm

The PC will reach out to the community through newspaper interviews, hand-delivered informational flyers, formal and informal existing town announcement avenues, introduction to a community plan video series involving residents, and two initial town meetings. These “kick-off” mechanisms are to create an enthusiasm and awareness in the community concerning the comprehensive plan update. Two months will be devoted to the preparation and execution of the “kick-off” activities since a lack of diverse, deep community involvement could result in a plan that does not reflect the entire community.

### Community Involvement

Ten months are devoted to community involvement through traditional and innovative means. Acquiring public input and participation is accomplished through:

- Newspaper media awareness including quarterly interviews with all major newspaper outlets.
- A web page specifically devoted to the comprehensive plan including a blog highlighting the release of information and upcoming events as well as an archive of documents.
- An innovative video interview series focusing on specific questions while highlighting those who live and work in Purcellville.
- Online surveys which coincide with the video interviews. The surveys will contain approximately six questions every two weeks for six video episodes.
- Two initial open-ended public input sessions to ascertain general public thoughts, feelings and concerns about the town.
- Four to six focused public input sessions on specific topics or geographic areas that use active community planning tools.
- A final public recap meeting on the summary findings of the public input process before beginning development of the plan document.

### Analysis

Analysis of objective data and the community's input will be completed by the town planning staff and consultants with further discussion by the PC, an advisory board, and separate town boards. Early analyses will guide the focus of later survey questions and town meetings. The results and analysis of survey questions will be posted every two weeks on the website for the community to see the direction of the analysis. At the end of the primary community involvement process and prior to developing the plan document, a final recap meeting will present the PC's summary findings to obtain the public's acknowledgement and confirmation of the results.

### Quality Product

The PC and town planning staff have a goal of a final comprehensive plan that will, hopefully, be recognized for its innovative and well thought-out process resulting in a document that serves as a model for other communities.

## **6. SCOPE OF WORK**

Scope gives definition to the project. This section explains specifically what the project should achieve as well as the key dimensions, boundaries, and limits of the project.

### **6.1 Project In-Scope**

- Establishment of an overall vision for Purcellville's next 20-25 years.
- Numerous meetings to gather public input on general and specific topics.

- Review and update of all subject matter in the 2025 Plan including topics such as transportation, housing, and economic development.
- Creation of a plan element for adjoining lands outside of town.
- Creation of an implementation plan detailing the necessary steps to execute the plan after its approval.
- Creation and maintenance of a web site to inform the public, gather input, and archive materials throughout the update process.
- Creation of a new comprehensive plan document.

## 6.2 Project Out-of-Scope

- Full revision of the *Comprehensive Parks, Recreation, & Open Space Master Plan*.
- Full revision of the *Purcellville Townwide Transportation Plan*.
- Creation of a separate Economic Development Plan.
- Creation of new Board of Architectural Review (BAR) Design Guidelines.
- Creation of a full replacement for the Purcellville Urban Growth Area Management Plan that would be jointly adopted with Loudoun County.

## 6.3 Measures for Success

- Complete final comprehensive plan within 15% of estimated schedule.
- Complete final comprehensive plan within 15% of estimated cost.
- Track involvement of residents, workers, and business owners to establish a baseline by which future outreach efforts can be measured.
- PMP, status reports, lessons learned, issue resolutions, and other historical records are maintained and included as an appendix in the comprehensive plan for future use.
- Website updated at least once every two weeks.
- All materials posted to website and maintained throughout the update process.
- Assumptions and methods of technical work included as an appendix in the final plan.

## 6.4 Constraints

Below is a listing of project constraints. A constraint is an item that limits the planning and execution of the project.

- Regular day-to-day business of development review, permitting, and enforcement must meet appropriate statutory deadlines, and any periods of high activity would result in a reduction of staff time available to meet the schedule for the comprehensive plan project.



- Future submission of applications requiring legislative action will necessitate the use of unplanned staff and Planning Commission time currently scheduled for the comprehensive plan project.
- Allocated consultant and intern time may conflict with deliverable due dates.
- October 2016 deadline for a Planning Commission recommendation on amendments to the comprehensive plan previously established by Town Council's approval of Resolution 15-01-02.
- March 2017 deadline for Town Council adoption of amendments to the comprehensive plan previously established by Town Council's approval of Resolution 15-01-02.
- Availability of Planning Commissioners for additional meetings and workshops beyond the Commission's regular meetings due to other external time commitments.
- Dependence on availability and schedule of external sources (e.g. the Virginia Department of Transportation).
- Necessity of working around holiday seasons for public input sessions to ensure maximum availability of citizens to provide input.
- Budgetary limitations affecting consultant use, intern use, staff overtime, and public input sessions.

## 6.5 Assumptions

Assumptions are key aspects which the Project Team believes to be true but should be expressly stated to ensure validity and concurrence, including funding, resource availability, and participants' roles. Any assumptions that may cause difficulties or misrepresentation later in the project are listed.

- The Planning Commission, with town staff and consultant recommendations and guidance, has complete control in how the comprehensive plan review and update process is planned and executed.
- The Planning Commission's analysis of objective data and public input will jointly determine the outcome of the comprehensive plan review and update process.
- A consultant is provided for planning session facilitation, formulation and evaluation of survey and town meeting questions, build-out analysis, creation of maps and diagrams, and any additional guidance necessary.
- Resource(s) is available to create and maintain a separate web page for the comprehensive plan review and update process.
- Resource(s) is available to assist in document formatting, content review, and proofing of text and graphics.
- IT resources will be available for web page set-up, monthly update maintenance, and to solve technical issues throughout the project life-cycle.
- Estimated town funds for the project life-cycle will be appropriated.

- No change in town planning staff over the project life-cycle.
- No major change in Planning Commissioner appointees over the project life-cycle.
- Project scope, as stated in Section 6, does not change.
- A planning commissioner, tasked with videography duties, will be available for the entire video and survey schedule.
- The final comprehensive plan will be a printed document.

## 6.6 Acceptance Criteria

- The final comprehensive plan has met or exceeded all Code of Virginia minimum requirements.
- The content of the final comprehensive plan addresses the issues noted in Resolution 15-01-02:
  - (i) an update of the Town's history and census information;
  - (ii) an update of the Town's plan for the physical development of the territory within its jurisdiction, including lands that have been incorporated into the Town's jurisdictional limits since 2006;
  - (iii) a plan for the physical development of territory located within the County's Joint Land Management Area for Purcellville;
  - (iv) amendments necessitated by the termination of the Town of Purcellville/County of Loudoun Annexation Agreement; and
  - (v) a transportation plan that identifies the transportation infrastructure needed to support the planned development of the territory covered by the plan.
- The final comprehensive plan has met or exceeded defined quality checks defined in the PMP.

## 7. RISKS

Risks are possible issues that may negatively or positively impact the comprehensive plan outcome. These risks could result in cost and time overruns, an increase or reduction in the scope of the project, and/or a reduction in quality of the final comprehensive plan document. We identify risks to prepare solutions in case the risk becomes imminent.

Mitigation measures can be directed towards reducing the severity of risk consequences, reducing the probability of the risk materializing, or reducing the organization's exposure to the risk.

The risk identification, assessment, and mitigation information identified during the planning phase, shown in **Table 7.1**, will be reviewed throughout the comprehensive plan review and update process. Any additional risks identified in the future will be added and then tracked.

**Table 7.1**

<div style="text-align: center;"> <b>Risk Rating Table</b>  </div>			
<b>Risk Rating</b>	<b>Risk Area (Schedule, Cost, Scope, Quality)</b>	<b>Risk</b>	<b>Mitigation or Contingency Plan</b>
1	Schedule, Cost, Scope, Quality	Other entities try to control or influence the comprehensive plan project execution or outcomes	Convey to all entities the roles of the different entities. Consistently communicate that message throughout the project life-cycle.
1	Quality	Lack of public input	Educate public on the importance of meeting attendance. Inform community through multiple avenues.
1	Quality	Lack of diverse public input	Educate public on the importance of meeting attendance. Inform community through multiple avenues.
2	Schedule	Videographer not available for periods of time	Build in longer timeframes for video production. Verify videographer's schedule on a quarterly basis.
3	Schedule, Quality	Planning Commissioner replacement after 2016	Commissioners that are not reappointed will be asked to join the Advisory Board.
4	Schedule, Cost, Quality	Consultants and interns do not produce quality work causing rework	Special attention reviewing work early in the project. Provide immediate feedback to consultants about work output.
4	Scope	Estimated budget amount is not appropriated	Reduce the scope of work. Schedule for work will be lengthened.
4	Schedule, Cost	Consultants and interns do not complete time commitment	At weekly meetings ask for issues that may hinder future work.
4	Schedule, Quality	Service or user issues with web page and survey software	Involve IT personnel in regular status meetings and test each web page change and content update before public release.
4	Schedule	Designated meeting location does not have adequate capacity for number of attendees	Ask public to RSVP for general and focus meetings to estimate attendance.
5	Schedule, Quality	Planning Commissioners step down unexpectedly	Commissioners that step down will be asked to join the Advisory Board.

Risk Rating	Risk Area (Schedule, Cost, Scope, Quality)	Risk	Mitigation or Contingency Plan
5	Scope, Quality	No clear vision produced from public input sessions	Meeting purpose, focus, and types of questions must be well-defined and controlled by one meeting facilitator.
5	Scope, Quality	Survey questions unclear or do not produce useable comments	Survey purpose, focus, and types of questions must be well-defined and reviewed.
7	Schedule, Cost	Code of Virginia concerning comprehensive plan review and update requirements change	No contingency
7	Schedule	Web page updates are not posted consistently	IT attendance at regular staff meetings and knowledge of web page update schedule.
9	Schedule, Quality	Committees consulting as content experts do not meet regularly to complete tasks on time	Explain importance of committee tasks at the beginning of the project.

## 8. WORK BREAKDOWN STRUCTURE

The WBS outlines the project deliverables with the associated deliverable owner, estimated time, and estimated cost for each deliverable. The WBS is completed during the project planning phase and is the prerequisite of a project schedule.

The Project Schedule is identified as Appendix C – Work Breakdown Structure.

## 9. MILESTONES

**Table 9.1** contains milestones, represented by minor deliverables and tasks of strategic importance, to produce the major final comprehensive plan deliverable. A deliverable (the word is interchangeable with product) is an item that can be seen, touched and given to an individual or group. A task is not a product but an action necessary to generate deliverables. The table defines the milestone owner(s), estimated start date, and expected days to complete the milestone. The comment section provides clarification and status updates.

**Table 9.1**

Milestone	Owner(s)	Estimated Start Date	Estimated Duration	Comments
PMP Complete	Paist/Galindo	3/2/15	57 Days	
Intern Hired	Galindo/Sullivan	4/10/15	52 Days	
Consultant Hired	Galindo/Sullivan/ Paist/McCollum	4/10/15	127 Days	
Website Published	Galindo/Maday/	4/27/15	93 Days	

	Kasmier			
Background Information Summary Report	Galindo/Sullivan	6/1/15	30 Days	
Technical Review Committee (TRC) Membership Finalized	Galindo	6/1/15	30 Days	
Comprehensive Plan Advisory Board (CPAB) Membership Finalized	Paist/PC	6/1/15	30 Days	
2025 Plan Review Findings Report	Galindo/PC/CPAB/TRC	7/1/15	51 Days	
Public Awareness Campaign	Paist/PC	7/27/15	49 Days	
Videos, Surveys, and Results Published to Website	Galindo/Van Istendal/Maday/Kasmier	7/27/15	162 Days	
"Kick-off" Input Sessions	Consultant/Galindo	8/3/15	47 Days	Projected Dates: 9/12/15 & 9/19/15
Preliminary Community Vision and Guiding Principles Established	Galindo/PC	10/1/15	1 Day	
Focus Input Sessions	Consultant/Galindo/Paciulli	9/21/15	247 Days	Projected Dates: 11/14/15, 1/9/16, 2/13/16, 3/12/16, 4/9/16 & 5/14/16
Summary Findings Report	Galindo/Consultant	5/16/16	18 Days	
Public Recap Meeting	Galindo/Consultant	5/16/16	27 Days	Projected Date: 6/11/16
Outside of Town Update Report	Galindo/Consultant/PC	6/13/16	70 Days	
Transportation Update Report	Galindo/Vanegas/Consultant	6/13/16	70 Days	
Parks and Recreation Update Report	Galindo/Scoggins/PRAB/Consultant	6/13/16	70 Days	
Economic Development Update Report	Galindo/Sullivan/EDAC/Consultant	6/13/16	70 Days	
Town Build-out Analysis	Consultant/Galindo	6/13/16	70 Days	
Community Design Update Report	Galindo/BAR/Consultant	6/13/16	70 Days	
Draft Maps and Diagrams	Consultant/Galindo	6/27/16	60 Days	
Draft Plan for Transmittal to VDOT	Galindo/Consultant	6/13/16	102 Days	
VDOT Review and Response	VDOT	9/23/16	90 Days	
Complete Comprehensive Plan	Galindo/Consultant	9/16/16	119 Days	
PC Public Hearings and Vote	Paist/PC	1/13/17	35 Days	Projected Hearing Date: 2/2/17 Projected Date of Vote: 2/16/17

## 10. SCHEDULE

The project schedule depicts the project tasks' planned start and end times in a Gantt chart format. The project schedule will be updated and revised as actual task times are reported. **Table 10.1** depicts a simplified schedule.

The full Project Schedule is identified as Appendix D - Schedule.

**Table 10.1**

Tasks	2015												2016												2017	
	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February		
Develop Project Plan																										
Acquire Intern																										
Acquire Consultant																										
Web Page Set-Up																										
2006 Comp Plan Review																										
Community Awareness Drive																										
Community Input																										
Document Formation																										
Public Hearing(s)																										

## 11. FUNDING SUMMARY

Upon establishment of any acquisition needs the Purcellville town staff will follow the appropriate processes, working collaboratively with the Town Council and Planning Commission, to develop and execute the acquisition and funding. **Table 11.1** depicts the item description, estimated amount needed, the fiscal year to be charged the funded item, and time frame for use. **Table 11.2** provides the results of staff's research on the amounts that other Virginia communities have paid for consultants to assist in updating their comprehensive plans with descriptive comments.

**Table 11.1**

Description	Estimated Budget Amount	Fiscal Year(s)	Estimated Time Frame for Use
Consultant – Planning Commissioner Training Session	\$2,000	2015	April 2015
Consultant – Project Execution	\$50,000 - 100,000	2016/2017	August 2015 – March 2016
Intern(s)	\$0	2016/2017	June – August 2015 & June – August 2016
Printing Services	TBD	2017	March 2017
IT Software, Domain Name	TBD	2015/2016	May – July 2015
Materials and Venue(s) for Public Input Sessions	\$500 - 1000	2016	September 2015 – June 2016
Materials for Publicity	\$500	2016/2017	September 2015 – October 2016
Town Staff Overtime for Additional Meetings and Work Associated with the Project	\$8,000	2016/2017	July 2015 – March 2017

**Table 11.2**

Community	Amount Paid	Comments
Herndon	\$175,000	Downtown Plan with Historic Resources Study, Market Study, and Infrastructure Assessment
Bristol	\$138,000	Comprehensive Plan and 2 Small Area Plans; Spread Over 3 Fiscal Years
Manassas	\$115,000	Comprehensive Plan
Culpeper	\$96,000	Award-winning Comprehensive Plan
Hopewell	\$85,000	Budgeted Amount for Comprehensive Plan; Still in RFP Process
Winchester	\$75,000	Award-winning Comprehensive Plan; Used Consultants Most Similarly to Our Projected Use
Haymarket	\$50,000	Comprehensive Plan; Used Consultant Already on Long-term Contract (No Project Specific RFP Issued)
Dumfries	\$35,000	Comprehensive Plan; Used Consultant Already on Long-term Contract (No Project Specific RFP Issued)

## 12. ISSUES LOG

All issues are noted in the Issue Log with the issue's description, status, origination date, originator, required resolution date, impact to project, and resolution. The Issue Log should be reviewed weekly.

The Issues Log is identified as Appendix E - Issues Log.

### 13. ACTION ITEM LOG

The Action Log involves those complex actions of paramount importance and necessity to the project. The Action Log notes status, assigned date, description, result, who requested, who assigned, and due date.

The Action Item Log is identified as Appendix F - Action Item Log.

### 14. QUALITY ASSURANCE

Quality assurance must be attached to each requirement and deliverable. This process assures a review segment to control the quality of the work and resulting work products. **Table 14.1** depicts the deliverable, its description, the type of review, and the responsible party(ies) for conducting the review.

**Table 14.1**

Deliverable Item	Description	Type of Review	Reviewer(s)
PMP	Review the PMP for missed or unclear information	PC Workshop Walk Through, Peer And Expert Review	Dr. Chandler, PC, Town Staff, and Town Council
Survey and Video Outline	Review overall video and survey series, individual episodes, and intended execution and outcome	Meeting Discussions, and Expert Review	Town Staff and Attorney
Comprehensive Plan Review Analyzed Comments	Review the comments from various forms of public input after the comments have been analyzed and summarized by town planning staff in a written and oral report	Meeting Discussions	PC and Comp Plan Advisory Board
Survey Question Formation	Review proposed questions for clarity	Meeting Discussions	PC and Comp Plan Advisory Board
Video Scripts	Talking points for interviewing public and conveying information	Expert Review	Town Staff and Attorney
Consultant RFP	Announcement used to initiate consultant procurement	Peer Review	Town Staff
Intern Procurement Statement(s)	Announcement(s) used to fill intern position(s)	Peer Review	Town Staff
Web Page (initial)	Design and testing of web page before public release	User Testing	Town Staff, PC Chairs
Web Page (updates)	Testing of web page actions and content review before public release	User Testing	Town Staff, PC Chairs
Community Awareness List and Taskings	List of action items to initiate public awareness of upcoming comprehensive plan activities	Peer Review	CommDev Director
Public Awareness Flyer	Flyer about comprehensive plan, upcoming calendar events, ways to participate, and web page information	Peer Review	CommDev Director



Deliverable Item	Description	Type of Review	Reviewer(s)
Public Focus Meeting Set-up List and Public Announcement	Technical issues to physically set-up, announce, and conduct public focus meetings	Peer Review	CommDev Director
Public Focus Meeting Agenda, Objectives, and Roles	Content and objectives of the public focus meetings	Meeting Discussions	PC and Comp Plan Advisory Board
Survey Analyzed Comments	Review reports before the reports are put in front of committees for discussion	Meeting Discussions	CommDev Director
Focus Meeting Analyzed Comments	Review reports before the reports are put in front of committees for discussion	Meeting Discussions	CommDev Director
Topical Update Reports	Review of initial and subsequent report drafts	Meeting Discussions	Specific Boards, PC and Comp Plan Advisory Board
Comprehensive Plan Draft	Review of initial and subsequent comprehensive plan drafts	Meeting Discussions	Specific Boards, PC and Comp Plan Advisory Board
Public Meeting Agenda and Presentation	All general public meetings not covered as focus meetings	Peer Review	CommDev Director, PC and Comp Plan Advisory Board

## 15. SUPPORTING MANAGEMENT PROCESSES

There are additional processes that will be utilized and managed during the project execution. These processes are important enough to note where the process exists or to create the process as a part of the project planning.

### 15.1 Consultant Acquisition and Management

The process of acquiring the comprehensive plan consultant will comply with the Town of Purcellville Purchasing and Procurement Guidelines under the direction of the Finance Department.

### 15.2 Data Management

Incoming data will arrive from many sources such as surveys, meeting minutes, external sources for technical data, document drafts, and issue and action logs. All hard copy documents will be maintained throughout the update process and for any length of time as may be required by the Code of Virginia. All documents created digitally or that can practically be scanned will be provided on the project web site throughout the update process and then maintained on town servers for any length of time as may be required by the Code of Virginia.

### 15.3 Lessons Learned

Regular status reports will contain a section of “lessons learned” for future comprehensive plan reviews and updates.

## 16. COMMUNICATION

**Table 16.1** establishes basic types of communications for project success, including meetings and status reports. Other types of reporting and communications may be discovered and added to the table during the project planning phase.

**Table 16.1**

Title	Communication Type	Owner	Participants	Frequency or Date	Comments
PC Updates	Written distribution and Meetings	Galindo	PC, Comp Plan Advisory Board, Public	Bi-monthly	
Town Council Status Updates	Town Council Meetings	PC Chair or Vice-Chair	Town Council, Public	Quarterly	
Public feedback and updates	Website by video, blog, and documents	Galindo, PC Chair and Vice-Chair	Public	Bi-monthly	
Newspaper Media	Media Notes and Interviews	PC Chair, Town Staff	Media	Quarterly	On-going communications as necessary
Initial Public Awareness 1	Utility Bill	Galindo, Town Staff	Public	Insert in September 2015 Utility Bill	On-going communications as necessary
Initial Public Awareness 2	Flyers through Personal Distribution	PC	Public	Early September 2015	Possible door-to-door distribution
Initial Public Awareness 3	Official Newspaper Announcement	Galindo, Town Staff	Public	Early September 2015	On-going communications as necessary
Initial Public Awareness 4	Media Focus	Media, Chair and Vice-Chair	Public	Early September 2015	On-going communications as necessary
Initial Organizational Awareness	Flyer Announcement	Town Council Reps, PC Chairs	Purcellville Organizations	Early September 2015	

## 17. PROJECT TEAM

**Table 17.1** depicts the core project team members. Other temporary team members may be added with core project team discussions and asked to join project planning sessions.

**Table 17.1**

Name	Title	Project Role
Gil Paist	Chair – Planning Commission	Co-Project Lead
Daniel Galindo	Senior Planner	Co-Project Lead
Doug McCollum	Vice Chair – Planning Commission; Town Council Liaison	Direct analysis discussions and decisions, meetings with Town Staff
Nedim Ogelman	Planning Commissioner	Analysis discussions and decisions, specific tasks as volunteered
EJ Van Istendal	Planning Commissioner	Analysis discussions and decisions, specific tasks as volunteered
Theresa Stein	Planning Commissioner	Analysis discussions and decisions, specific tasks as volunteered
Chip Paciulli	Planning Commissioner	Analysis discussions and decisions, specific tasks as volunteered
Chris Bledsoe	Planning Commissioner	Analysis discussions and decisions, specific tasks as volunteered
Joan Lehr	Town Council Representative	
Patrick Sullivan	Director of Community Development	Staff
Alex Vanegas	Director of Public Works	Staff
Melanie Scoggins	Events Specialist	Staff
Dan Maday	IT Manager	Staff
Ross Kasmier	IT Systems Administrator	Staff
TBD	Consultant	Staff
Heidi Mitter	Intern	Staff

## 18. SUB-TEAMS

In addition to the core project team noted in Section 17 there may arise a need to institute temporary sub-team(s) throughout the project to address specific items. If a sub-team is formed the sub-team's purpose, time duration, and final deliverable will be stated in this section, as well as a duplicated **Table 18.1**.

### 18.1 Comprehensive Plan Advisory Board

The Comprehensive Plan Advisory Board will convene with the PC during the second PC monthly workshop to add perspectives to discussions. The Advisory Board will consist of one person nominated from each existing town board. The members of town boards have exhibited an interest in town volunteer work, subject matter knowledge, and have been appointed to their respective positions. If a board does not put forth a person to be a part of the Comprehensive Plan Advisory Board, that board will not be represented. In addition, any Planning Commissioner that steps down or is not reappointed will be asked to join the Advisory Board. The Advisory Board does not vote in PC meetings or on PC concerns.

**Table 18.1**

Name	Representing	Sub-Team Role
TBD	Parks and Recreation Advisory Board	Advisory Member
TBD	Economic Development Advisory Committee (EDAC)	Advisory Member
TBD	Board of Architectural Review	Advisory Member
TBD	Purcellville Arts Council	Advisory Member
TBD	Board of Zoning Appeals (BZA)	Advisory Member

## 19. PROJECT CLOSE-OUT

At completion of the comprehensive plan project, all documents and artifacts concerning the planning and execution of the comprehensive plan will be archived for future research. The PMP, estimated schedule baseline, and the actual completed schedule will be included in an appendix of the final comprehensive plan document.

## 20. PLAN ARTIFACTS

A plan artifact is an item used as a reference or informational document to be updated as part of the project execution. **Table 20.1** lists the artifacts for the comprehensive plan review and update process, which includes the description, update frequency if applicable, and location to find the artifact.

**Table 20.1**

Artifact	Description	Update Frequency	Location
Adopted <i>Purcellville, Virginia 2025 Comprehensive Plan</i> (2006)	Currently adopted comprehensive plan.	N/A – informational purpose only	TBD
Non-adopted PC Comprehensive Plan Review Comments (2011)	Results of most recent comprehensive plan review.	N/A – informational purpose only	TBD
Adopted <i>Purcellville Townwide Transportation Plan</i> (2009)	Currently adopted comprehensive plan element.	N/A – informational purpose only	TBD

Artifact	Description	Update Frequency	Location
Adopted <i>Comprehensive Parks, Recreation &amp; Open Space Master Plan</i> (2004)	Currently adopted comprehensive plan element.	N/A – informational purpose only	TBD
Rescinded <i>Purcellville Urban Growth Area Management Plan</i> (1995)	Plan which previously regulated areas outside of town.	N/A – informational purpose only	TBD
Non-adopted Downtown Master Plan (2005)	Developed prior to the 2025 Plan. Partially incorporated into 2025 Plan.	N/A – informational purpose only	TBD
Eastern Gateway Charrette Presentation Slides (2010)		N/A – informational purpose only	TBD
Hirst Road Corridor Charrette Summary Report (2009)		N/A – informational purpose only	TBD
Schonder & Rust Properties Charrette Summary Notes (2006)		N/A – informational purpose only	TBD
Purcellville Downtown Charrette Report (2003)		N/A – informational purpose only	TBD
Town of Purcellville Market Study Update (Sept. 2014)		N/A – informational purpose only	TBD
Loudoun County General Plan (2001)		N/A – informational purpose only	TBD
City of Winchester (VA) Comprehensive Plan 2011	Won 2013 Comprehensive Plan Award from Virginia Chapter of the American Planning Association	N/A – informational purpose only	TBD
Town of Culpeper (VA) Comprehensive Plan (2013)	Won 2012 Comprehensive Plan Award from Virginia Chapter of the American Planning Association	N/A – informational purpose only	TBD
Current Town Demographics and Map Information		N/A – informational purpose only	TBD
2015-2017 Comprehensive Plan Review PMP		As Necessary	TBD
Project Schedule		As Necessary	TBD
Project Plan Action Log		As Necessary	TBD
Project Plan Issues Log		As Necessary	TBD
Community Comprehensive Plan web page		As Necessary	TBD

## 21. ACRONYMS AND DEFINITIONS

2025 Plan –	<i>Purcellville, Virginia 2025 Comprehensive Plan</i>
BAR –	Purcellville Board of Architectural Review
BZA –	Purcellville Board of Zoning Appeals
CPAB –	Comprehensive Plan Advisory Board
EDAC –	Purcellville Economic Development Advisory Committee
IT –	Information Technology
PC –	Purcellville Planning Commission
PMP –	Project Management Plan
PRAB –	Purcellville Parks and Recreation Advisory Board
RFP –	Request for Proposals
TBD –	To Be Determined
TRC –	Technical Review Committee
VDOT –	Virginia Department of Transportation
WBS –	Work Breakdown Structure

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<sup>1</sup> *PM Network*, v. 10, no. 11 (Nov. 1996), pg. 21-24.

<sup>2</sup> *The Albemarle County Land Use Law Handbook*, Ch. 9, pg. 9-4 & 9-5

### Priorities Established for Work Items Since November 2015

Priority	November 19, 2015 Results	March 3, 2016 Results	June 16, 2016 Results	November 17, 2016 Results	Current
1	RZ15-01 (781 S. 20 <sup>th</sup> St.)	Comp Plan Update	Comp Plan Update	Comp Plan Update	
2	Transitional Housing	Floodplain Regulations	Floodplain Regulations	Floodplain Regulations	
3	Civil Penalties	Civil Penalties	Civil Penalties	Tree Preservation Regulations*	
4	Sign Regulations	Sign Regulations	Sign Regulations	Stream and Creek Buffer*	
5	Accessory Dwelling Standards	Accessory Dwelling Standards	Accessory Dwelling Standards	Reduce Maximum Building Heights in the C-4 District*	
6	Tree Preservation Regulations	--	--	Civil Penalties*	
7	--	--	--	Sign Regulations	
8	--	--	--	Accessory Dwelling Standards	
9	--	--	--	--	
<u>Notes:</u>	Active external legislative applications: <b>5</b>	Active external legislative applications: <b>3</b>	Active external legislative applications: <b>4</b>	Active external legislative applications: <b>6</b>	Active external legislative applications: <b>8</b>
			<b>Planning Commission created a subcommittee to work on:</b> Stream and Creek Buffer Tree Preservation Regulations Reduce Maximum Building Heights in the C-4 District Steep Slope Standards Establishing a Maximum Amount of Land Disturbance Allowed Without a Permit Amending Screening Required Between Residential & Non-residential Zoning Districts	* Items initiated by Town Council via Resolution 16-10-02 on October 11, 2016 which were supposed to be "considered and acted upon" in the order shown above.	